

52 THINGS EVERY ADVERTISING AND MARKETING
PROFESSIONAL SHOULD KNOW

THE **ART** OF CLIENT SERVICE

THE CLASSIC GUIDE
THIRD EDITION

ROBERT SOLOMON

FOREWORD BY IAN SCHAFER, FOUNDER AND CEO, DEEP FOCUS

WILEY

THE ART OF CLIENT SERVICE

**THE CLASSIC GUIDE
THIRD EDITION**

ROBERT SOLOMON

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"As a young strategic client service professional who's worked in both the United States and Australia, this book is my advertising bible. It's the real deal—if you are working in advertising and want to know how it all works, this is all you need to read."

Jess Norton
Integrated Account Manager
The Mark Agency
Canberra, Australia

"As a manager of a young client services team, this book is key. At IMPACT, we've made it a must-read for all of our new hires and it feels like we reference it daily."

Bob Ruffolo
Founder and CEO
IMPACT Branding & Design
Wallingford, CT

"The Art of Client Service is the first book we give to new employees on how to approach account management. Robert takes what has become increasingly complex and translates it into actionable steps that help agencies get better at serving clients."

Drew Himel
Founder and CEO
PCR
Jacksonville, FL

"Over the years, I have handed out Robert's book as encouragement to account people who needed a bit of coaching. They always thanked me for taking an interest in their careers. Creative people found it equally insightful and wanted their own copies. With this new edition, I'll be advancing a lot more careers."

Richard Eber
Creative Guy
O2kl
New York, NY
Former Executive Creative Director
MRM

"Over the past decade, the discipline of account management has come under fire as never before. Externally, clients sometimes question its value, and internally, account managers fight to overcome the perception being order takers. The Art of Client Service shows

how this critically important function can become more valuable than ever before, and how client service professionals can effectively evolve beyond the role of agency–client liaison to become proactive leaders of marketing initiatives. For years Robert Solomon's book has set the standard for developing a successful career in engagement management, and this new edition adds crucial new skills and principles needed to succeed in the twenty-first-century agency environment."

Tim Williams

Founder, Ignition Consulting Group
Author, *Positioning for Professionals*
Salt Lake City, UT

"Robert explains simply the complex issues of client relationship management with insight, practical advice, and humor—making it a must-read for all in the marketing communication profession and for anyone aspiring to demonstrate leadership. It's why it is required reading for all of my university students."

Sally Webster

Senior Lecturer
Public Relations and Organizational Communication
Victoria University
Melbourne, Australia

"The Art of Client Service is the first thing that people receive upon joining my team; it's the closest thing we account people have to a Bible."

Jamie Bryan

Executive Director, Client Services
Deep Focus
New York, NY

"As an agency owner, I continually seek inspiring, relevant resources to help motivate, train, and guide my team. Robert has a mastery of client service, and presents ideas not just theoretically, but in meaningful, actionable ways that directly impact our day-to-day business. The Art of Client Service is for anyone who values the often overlooked skill of developing, growing, and sustaining successful client relationships regardless of agency size or location."

Toni O'Berry

Principal
O'Berry | Collaborative
Bozeman, MT

"There are only a handful of books in my business library that seem to get better with age. Robert Solomon's The Art of Client Service is one of them. An instant classic when it was first released, Solomon continues to build on The Art of Client Service's usefulness, timeliness, and importance with each passing edition. It's a "must-read" for anyone involved in a client-facing business ... and let's face it, we all are. If you are an advertising agency account manager or account executive, I highly recommend not only reading, but also living, everything in this book."

Ken Ohlemeyer
Senior Account Manager
Brighton Agency
St. Louis, MO

"For ad agency account managers, Solomon's book defines what it takes to be really great at the job. Great stories combined with relevant examples that go to the absolute heart of client service."

Roderick English
Marketing Communications Consultant
Adjunct Professor
Canisius College
Buffalo, NY

"Robert has crystallized for our industry a fundamental truth: that relationships of trust allow great work to flourish, but great work alone is never enough."

David Herrick
President, U.S.
Cohn & Wolfe
New York, NY

*"The one constant in the constantly changing agency business, including digital, is **client service**. Robert Solomon has been the authority on client service for many years and The Art of Client Service has become a must-read for both newbies and veterans. His latest edition even includes a tactical primer that will make any agency professional just that much better."*

David Vining
Vice President, Corporate Partnerships
CoreNet Global
Atlanta, GA

"This edition of The Art of Client Service provides an essential, detailed roadmap to successfully manage accounts, ensuring that clients and agencies prosper."

Mike Slosberg
Co-founder, Chief Creative Officer Emeritus
Digitas
New York, NY

"The Art of Client Service helped us figure out how to transition from one-off, project engagements to long-term, stable client relationships. The book helped us understand what such relations should feel like, and I used it as a guide to build our client services practice and cast leadership for the agency."

Ivan Todorov
Chief Executive Officer
BLITZ
Los Angeles, CA

"A timely treatise of timeless wisdom. Robert Solomon writes with inspiring clarity."

Tom Sebok
Executive Vice President
BBDO Worldwide
New York, NY

"The Art of Client Service introduced me to client service when I was in school, guides me now as I learn my craft, and continues to serve as an essential source of counsel as I progress in my career."

Derek Hickey
Senior Account Executive
Area23
New York, NY

You either get better or you get worse. So for me, I'm focused, in every way, on getting better.

Max Scherzer

FOR MY PUBLISHING FRIEND DAN,
WHO TOLD ME THAT PUBLISHING A SECOND BOOK WOULD BE
HARDER THAN THE FIRST—A COMMENT THAT,
TO THIS DAY, REMAINS TRUE.

AND FOR MY WIFE,
ROBERTA,
MY PARTNER
IN ALL THINGS THAT MATTER,
INCLUDING THIS.

FOREWORD

Dear Robert,

When I started my advertising agency, Deep Focus, at the age of 26 in 2002, I had no idea what I was doing. What I wanted to do was reimagine the “agency” for a modern world with modern challenges, one unencumbered by legacy business models. As media changed around us, it began to change consumers, and I knew that clients would be met with more complex problems to solve, and more complex consumers to market to. One of the things I learned along the way was that businesses have problems to solve, and clients have problems to solve—and they are not always the same problems.

I thought the answer to building a client service–focused agency was just caring a lot about our clients’ businesses. But it’s so much more. If I had had *The Art of Client Service* by my side when I began, I have no doubt that I would have been able to accelerate the growth and maturation of our agency faster and more responsibly. We did a lot of great work in spite of not knowing how to properly manage our clients to greatness. We learned a lot of lessons the hard way.

But it didn’t have to be like that. If I had a time-traveling DeLorean, I’d go back in time and leave a copy of *The Art of Client Service* on my desk.

I wish I had this book when I was starting out in my career, much less when I was starting Deep Focus. But I sure was glad a mentor gave it to me several years ago. Immediately upon putting it down, I made moves that fortified our client service

organization, and enabled us to be able to not only weather the storm of an economic downturn, but emerge from it as an even stronger organization. It is now required reading for everyone on our client services team and beyond. In fact, I even recommend it to our clients so they can understand what to expect from their partners at Deep Focus—and why.

After building Deep Focus over the past 13 years into a global agency doing award-winning work for some of the best brands in the world with over 500 amazingly talented people, I've found that "client service" is something everyone who works here (including creatives) must take quite seriously. And great client service is what enables us to do the great work that makes us proud, and firing on all cylinders. It's why I encourage everyone who works at Deep Focus to read this book. It's why I have had you speak to my teams in multiple offices. And it's why I know my colleagues will benefit from reading *The Art of Client Service* from cover to cover.

Thankfully, as quickly as the world around us changes, that's how timeless *The Art of Client Service* is.

The rapid evolution of media and technology demands even more decision-making, more leadership, and more rigor from a profession that has historically been a great fit for generalists. But it's harder now to be a generalist than ever before because there is so much more to know, and so much more to do. And it's becoming more difficult to do all of those things simultaneously. Agencies need more training, development, and more hours in the day. Managing clients and agency teams has never been more difficult, and order must be brought to chaos to make sense of it all. If you're someone reading this, you're already well on your way to learning how to do just that.

The lessons you will learn from this book are supported by candid accounts and anecdotes that are relevant to you whether you're just starting out in this business or have been in it for decades, whether you run an agency or are just starting out as one. It will teach you how to be a leader, how to channel your empathy to motivate others, and how to guide clients toward great work, and how to build relationships that will keep on giving. Simply put, this book will help you be great at your job.

The new edition of this book features updated material, but still delivers the core concepts that will hold true as long as agencies and clients exist. It educates you about the mistakes many of us have made so you don't have to. And while many books about advertising are written about strategy and creativity, this one is utterly indispensable for anyone in client service. If you encounter a client management or service issue, you'll find solace and help in *The Art of Client Service*. If you're a manager, this book will be essential to helping you build a team of client service professionals who can enable great work, and a better business.

From time to time, I'll see someone reading this book in a train station, on the subway, or in a park. When I do, I give them my card. They've got their priorities straight, and I have a new recruit.

My sincerest thanks to you, Robert, for writing *The Art of Client Service*. This industry is better for it, my agency is better for it, and I am better for it.



Ian Schafer
Founder and Global Chairman
Deep Focus

INTRODUCTION

“IT SEEMS SO SIMPLE; WHY IS IT SO HARD?”

I didn't know Shelly Lazarus well; she introduced herself when I was running Foote, Cone & Belding's West Coast direct marketing operation and she was CEO of Ogilvy Direct, the direct marketing arm of famed advertising agency Ogilvy & Mather. Our paths would cross from time to time—we saw one another at a pitch for the Delta Air Lines' account—but we were far from friends.

Even so, after I wrote the second edition of *The Art of Client Service*, I sent the book to her. Shelly had by then ascended to become chair and CEO of Ogilvy's General agency; I was trying to generate some exposure and support for my newly published work. She was on the short list of agency executives to whom I planned to send a copy, with compliments.

I expected nothing in return, but Shelly was kind enough to write back with a handwritten note of thanks, which asked, “It seems so simple; why is it so hard?”

I have been thinking about this question for more than a dozen years. Serving clients well *should* be simple, except it isn't. Solving problems *should* be easy, but almost never is.

Very few people do these things well, and many do them poorly, which explains, in part, why so many accounts go into

review, so many client people express profound unhappiness with their agencies, and so many agency people remain bewildered by a business that, if anything, grows more complex as people grow increasingly less able to deal with it.

The previous two editions of *The Art of Client Service* made a modest attempt to address this, deconstructing many of the things client service people need to do consistently well to serve clients effectively. The second edition was certainly an improvement over the first, but as helpful as it was intended to be, it had shortcomings.

Absent from that edition is any discussion about how to do something as fundamental as formulate a scope of work, a schedule, or a budget. New business, something utterly essential to the continuity and growth of advertising and marketing agencies, barely gets a passing nod. And ideas? They are the currency agencies trade in, yet hardly earn so much as a mention.

We need a book that preserves everything that worked in the previous edition, but also addresses these other, essential items, plus looks at client service in a way that is more accessible to account people, and potentially more effective with clients.

This, I hope, is that book.

I began by rethinking the book's organization, starting with what it means to be great with clients, the role account management plays in new business, and how client service people contribute to building and sustaining relationships built on trust. There's a section devoted to formulating a creative brief, and one that deals with unhappy clients.

Although the people I spoke with were far from a homogeneous lot—different agencies, different clients, different challenges—their issues were surprisingly similar and recurring, with five common threads populating the narratives I heard, all of which I share.

Everything begins and ends with *what clients want*, and what they want is relatively straightforward: consistent execution partnered with solid ideas, driven by people who understand and care deeply about their business.

Straightforward, but by no means easy. There is no bigger challenge than discerning, then delivering, near flawless performance in a business complicated with collapsing deadlines and compressed budgets.

Simply put, there are easier ways to make a living. But for those of us who believe in what we do, this is a calling, not a job, something we are committed to pursue as well as we are able.

If I've done my job even halfway well, what I've written will help you in your quest.

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